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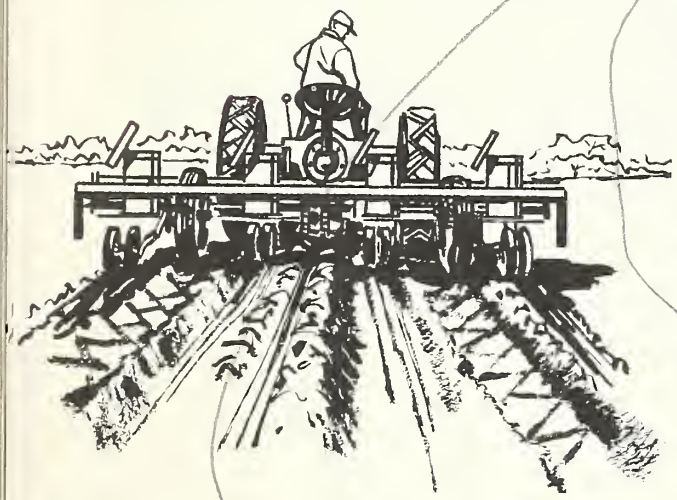
1970 VEGETABLES FOR COMMERCIAL PROCESSING



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acreage marketing guides

U.S. DEPARTMENT OF AGRICULTURE•CONSUMER AND MARKETING SERVICE
MARCH 1970 AMG 72

PREFACE

Acreage-marketing guides are prepared each year for principal vegetables used for canning and freezing. The commodities included are lima beans, snap beans, beets, cabbage for sauerkraut, sweet corn, cucumbers for pickles, green peas, spinach and tomatoes.

USDA's Consumer and Marketing Service continually studies markets for canned and frozen vegetables. These studies include evaluations of the pack per unit of production, per capita use, rate of disappearance of processed supplies in the current season compared with recent seasons, prices, and estimated carryover stocks. On the basis of these studies, recommendations have been developed for acreage levels in 1970, which with average yields, will result in a production for processing that will provide adequate quantities of principal canned and frozen vegetables to supply usual market needs. These recommendations were also reviewed by representatives of other USDA agencies who are familiar with the vegetable industry.

The final recommendations for 1970 vegetables for commercial processing are presented in this publication. In the past, when acreage has been held within the levels recommended by USDA, few marketing difficulties have been encountered.

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I. HIGHLIGHTS

The 1969 aggregate carryover of principal canned and frozen vegetables was a record. Anticipating high inventories, processors substantially reduced 1969 packs of most items. For several vegetables, canners cut packs of institutional sizes by a greater amount than retail sizes. The 1969-70 total supply of principal canned and frozen vegetables was moderately less than the record total reported a year earlier.

The cumulative disappearance of canned and frozen vegetables through the early winter of 1969-70 was considerably less than the record quantity reported in the like period in 1968-69. In particular, disappearance of frozen lima beans, sweet corn and green peas, has been at a rate much slower than last season's. Current supplies of processed vegetables--except frozen spinach, sauerkraut, and cucumber pickles--generally are heavy, and prices for most processed items continue under pressure for the second successive year.

Assuming a normal rate of disappearance during the remainder of the 1969-70 season, the 1970 aggregate carryover will be relatively large. Therefore, it is recommended that 1970 production of vegetables for processing, except cucumbers for pickles and frozen spinach, be reduced or held at approximately the 1969 level. For the latter two, production increases are recommended.

II. 1969 SUMMARY

Production of 9 principal crops for processing in 1969 totaled 9.3 million tons. This compared with almost 12.0 million tons in 1968 and 9.9 million tons in 1967. The smaller output was due to an across-the-board cut in 1969 plantings; yields for individual crops showed only small changes from 1968. Data for 1960-69 are shown in Figure 1.

Tomatoes accounted for the bulk of the total reduction in 1969 output for processing. The 1969 tonnage was 29 percent less than in 1968. Decreases in production of other vegetables for processing were: beets, 20 percent; sweet corn, 16 percent; green lima beans, 15 percent; spinach, 12 percent; snap beans, 10 percent; green peas, 10 percent; cucumbers for pickles, 8 percent, and cabbage for kraut, 4 percent.

California was the source of 38.6 percent of the 1969 total vegetable tonnage for processing. Wisconsin ranked second with 8.9 percent followed by Minnesota, 6.7 percent, Oregon, 5.7 percent and Ohio, 5.4 percent.

Compared with 1968, prices received by growers for 1969 processed vegetables ranged from slightly higher for spinach to substantially lower for tomatoes. Prices received for seven of nine vegetables ranged from slightly to moderately less. Growers received an average price of $34.70 per ton for tomatoes for processing in 1969 and $40.20 in 1968.

Because of the sharp decrease in production and lower prices paid to growers, total crop value for 9 vegetables for processing was down sharply from 1968. The 1969 value was $414 million compared with $559 million in 1968.

III. SUPPLIES OF CANNED VEGETABLES

All major canned vegetables except sauerkraut and pickles contributed to the increase in carryover stocks in 1969. The aggregate carryovers of canned lima beans, snap beans, beets, sweet corn, green peas, and spinach were estimated to be approximately 30 percent above 1968 and double the 1967 total. The 1969 carryover of sauerkraut was substantially below 1968, and carryover of cucumber pickles was moderately less. Although stocks data on tomatoes and tomato products are not available, sharply higher carryovers were indicated.

Preliminary data indicate significant reductions in 1969 packs for all major canned vegetables except spinach. With smaller 1969 packs more than offsetting higher carryover stocks, the aggregate total supply of canned lima beans, snap beans, beets, sauerkraut, green peas and spinach was estimated at 4 percent less than the 1969 record. However, this comparison has been modified by slow markets. Into the midwinter of 1969-70, cumulative disappearance of principal canned vegetables was moderately less than the record total in the comparable period of 1968-69.

The 1969 aggregate carryover of canned tomatoes, tomato juice, tomato catsup and chili sauce was indicated to be record high. As a result of a sharp cut in 1969 tomato tonnage for processing, the pack of tomatoes and tomato products was reduced sharply. On the basis of actual cases, the 1969 pack of canned tomatoes was down 34 percent according to the National Canners Association. Also, the pack of tomato juice was reduced 16 percent; and chili sauce, 25 percent. The pack of tomato catsup in 6/10's was reduced 54 percent; data on catsup packed in other container sizes are not available. The total supply of all tomato products available for 1969-70 was smaller than in 1968-69, when total supply was extremely heavy.

Assuming normal disappearance during the remainder of the 1969-70 marketing season, carryovers of canned vegetables will be plentiful. It is recommended that 1970 canned packs of green peas and sauerkraut should approximate the 1969 levels. A moderate reduction is recommended in packs of lima beans, snap beans, beets, sweet corn and tomatoes. However, a substantial increase is recommended for the 1970 pack of cucumber pickles.

IV. SUPPLIES OF FROZEN VEGETABLES

The 1969 aggregate carryover of frozen lima beans, snap beans, sweet corn, green peas and spinach was 454.3 million pounds, according to data compiled by the Statistical Reporting Service. The comparable carryover in 1968 amounted to 364.1 million pounds, and 261.1 million in 1967.

Except for spinach, 1969 carryover stocks of each of these major vegetables were up sharply over 1968. Frozen sweet corn carryover was up 63 percent, lima beans, 31 percent, green peas, 17 percent, and snap beans, 14 percent. Carryover of frozen spinach was down slightly.

Packs of each of these frozen vegetables were down sharply from 1968. The 1969 aggregate pack was 1.17 billion pounds compared with 1.38 in 1968 and 1.34 in 1967. The 1969 pack of frozen spinach was small, following a short crop for processing in California, the major source. The total frozen supply of lima beans, snap beans, sweet corn, green peas and spinach for 1969-70 was indicated at 1.62 billion pounds compared with 1.75 in 1968, and 1.60 in 1967.

Into midwinter of 1969-70, the disappearance of frozen vegetables was substantially below the like periods in 1968-69 and 1967-68. The disappearance of frozen sweet corn and green peas, in particular, was much less than the previous season, and prices for these two items were under pressure.

Assuming normal disappearance for the remainder of the 1969-70 marketing season, 1970 frozen carryover stocks are expected to range from moderate for lima beans and snap beans to heavy for sweet corn and green peas. Spinach carryover will be small. Therefore, the 1970 recommendations for production for frozen packs range from substantially less for sweet corn to substantially more for spinach. Slight reductions are recommended in production of lima beans, snap beans, and green peas.

V. FOREIGN TRADE IN PROCESSED VEGETABLES

Imports of canned tomatoes and tomato concentrates declined substantially in 1968-69 (Table 1). The lower import volume was the result of a depressed market following the record U.S. pack of processed tomatoes in 1968. Italy and Spain supply most of the imports of canned tomatoes, and the bulk of tomato paste and sauce imports originates in Portugal.

U. S. exports of canned tomatoes and tomato concentrates increased substantially in 1968-69, but were well below the volume exported in 1965-66. U. S. tomato juice exports were relatively small in 1968-69, but catsup-chili sauce volume was up moderately.

In addition to processed tomatoes, substantial export volume continued in 1968-69 for asparagus, green beans, sweet corn and green peas. However, exports of these commodities absorb only a small percentage of domestic packs.

Canada and Western Europe are the principal destinations for exports of canned vegetables. Canada and the United Kingdom take most of the exports of frozen vegetables. In 1968-69, frozen vegetable exports totaled 24.1 million pounds compared with 25.3 million in 1967-68, and the record volume of 33.0 million in 1964-65.

Table 1.--Selected Canned Vegetables: Imports and exports

Commodity	Marketing Season			
	1968-69	1967-68	1966-67	1965-66
	1,000 cases (basis 24/303's)			
Imports				
Peas 1/	294.0	239.9	154.7	162.4
Tomatoes 2/	4,882.3	6,583.7	4,647.9	4,278.8
Tomato Concentrates 2/	5,342.7	7,292.1	3,290.6	1,610.4
Exports				
Asparagus 3/	613.8	668.6	1,318.0	1,366.3
Beans, Green 2/	176.6	154.0	187.0	335.5
Corn, Sweet 4/	611.3	516.6	662.9	525.4
Peas, Green 1/	260.4	240.7	244.9	288.1
Tomatoes 2/	421.0	275.4	447.5	485.0
Tomato Concentrates 2/	442.3	343.0	414.8	582.1
Tomato Juice 2/	567.5	720.1	800.0	1,069.1

1/ Year beginning June 1. 2/ Year beginning July 1. 3/ Year beginning April 1. 4/ Year beginning August 1.
Source: Bureau of the Census, U. S. Department of Commerce.

VI. THE DEMAND FOR FRESH AND PROCESSED VEGETABLES IN 1970

The economy appeared to be slowing as the new decade began. Higher costs and expensive credit will probably influence less rapid industry expansion for most of 1970. The Federal Government, continuing the fight against inflation and trying to avoid a budget deficit, has announced cutbacks in spending and layoffs in defense and related areas. In addition, the housing industry continues under pressure.

Despite prospects for a slower economy and some rise in unemployment, disposable personal income gains will likely be maintained in 1970. Income tax reduction and larger social security payments may about offset a slight decline in the workweek and slower wage gains.

Thus, with population growing and consumer incomes continuing to advance, outlays for food, including those for most fresh and processed vegetables, are expected to expand in 1970. However, the rise in food spending is not expected to match the gain in consumers' after-tax incomes. Thus, the percentage of income spent for food will likely continue to decline in 1970.

In recent years, the vegetable industry has encountered rising production costs both on the farm and in processors' factories. To reduce costs per unit, vegetable growers have sought to increase yield per acre by adopting improved cultural practices and switching to improved varieties. Also, to the extent possible, they have switched from hand labor to mechanized equipment.

In the 1970's, the vegetable industry will continue to be one of intense competition for growers and processors. The less efficient will continue to be challenged by rising costs. Survival in the industry will require increasing efficiency in production and processing.

From 1960 through 1966, per capita use of fresh and processed vegetables combined held at approximately 200 pounds. Total use increased to 209 pounds in 1967, and 212 pounds in 1968 (preliminary). Fresh vegetables accounted for approximately 52 percent of the aggregate in 1960, but declined to 46 percent in 1968. Canned vegetables consumption was 40 percent of the total in 1960, and increased to almost 44 percent in 1968, while frozen use increased from 7 to 10 percent. Per capita consumption data for processed vegetables are shown in figures 2 through 5.

The outlook is for a continued decline in annual per capita consumption of fresh vegetables. However, per capita use of canned and frozen vegetables is likely to increase. Adverse weather--resulting in temporary shortages and high prices--restricts sales of fresh vegetables from time to time. By comparison, canned and frozen supplies of vegetables have been holding at high levels, and per capita use has been stimulated by attractive prices.

VII. GUIDE SUMMARY

Guides for each principal vegetable for processing are in Table 2. The total acreage guide in 1970 is 1,664,700 acres, 2 percent less than the 1969 aggregate. With normal acreage abandonment and average yields, the total production in 1970 would be 8,649,000 tons, 4 percent smaller than in 1969.

In 1970, 25 percent more acreage is recommended for spinach for freezing and 15 percent more for cucumbers for pickles. For other vegetables, the recommendations range from no change in acreage compared with last season to 10 percent less.

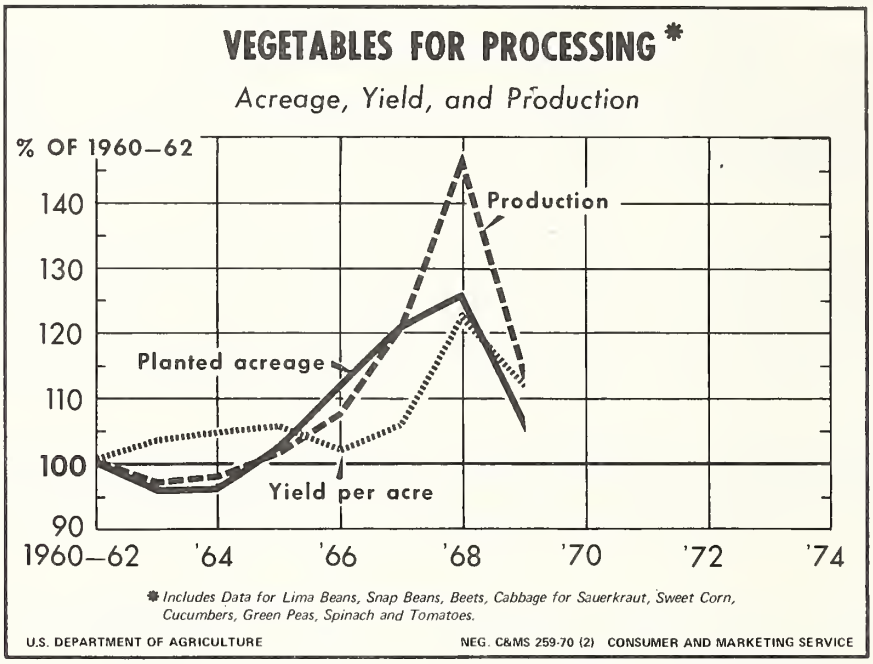


Figure 1

Table II.--Principal Commercial Vegetables For Processing
1970 Acreage-Marketing Guides With Comparisons

Commodity	Planted acreage			Production		
	1970 guide	1969	Percentage change recommended in 1970	1970 guide 1/	1969	Percentage change recommended in 1970
	1,000 acres	1,000 acres	Percent	1,000 tons	1,000 tons	Percent
Beans, Lima:						
Canning	30.0	31.6	-5	26.0	28.3	- 8
Freezing	57.2	57.2	No change	67.9	69.4	- 2
Total	87.2	88.8	-2	93.9	97.7	- 4
Beans, Snap:						
Canning	191.0	201.0	-5	444.7	451.6	- 2
Freezing	50.8	50.8	No change	113.3	113.9	- 1
Total	241.8	251.8	-4	558.0	565.5	- 1
Beets:						
Canning	16.9	18.8	-10	194.0	215.8	-10
Cabbage 2/						
Corn, Sweet:						
Canning	330.4	347.8	-5	1,384.3	1,462.8	- 5
Freezing	103.5	115.0	-10	519.6	623.7	-17
Total	433.9	462.8	-6	1,903.9	2,086.5	- 9
Cucumbers:						
For pickles	163.1	141.8	+15	577.9	508.0	+14
Peas, Green:						
Canning	280.2	280.2	No change	320.5	316.3	+ 1
Freezing	164.8	164.8	No change	207.8	208.4	- 1
Total	445.0	445.0	No change	528.3	524.7	+ 1
Spinach: 3/						
Freezing	14.0	11.2	+25	77.4	58.7	+32
Tomatoes:						
Canning	262.8	276.6	-5	4,715.6	4,928.8	- 4
Total	1,664.7	1,696.7	-2	8,649.0	8,985.7	- 4

1/ Computed: Product of acreage guide for harvest in 1970, less normal acreage loss, multiplied by the estimated yield per acre.

2/ Cabbage for sauerkraut included in early fall cabbage for fresh market; no change in acreage is recommended in 1970 early fall cabbage.

3/ Guide for spinach for canning not included because only partial data are available on carryover and pack.

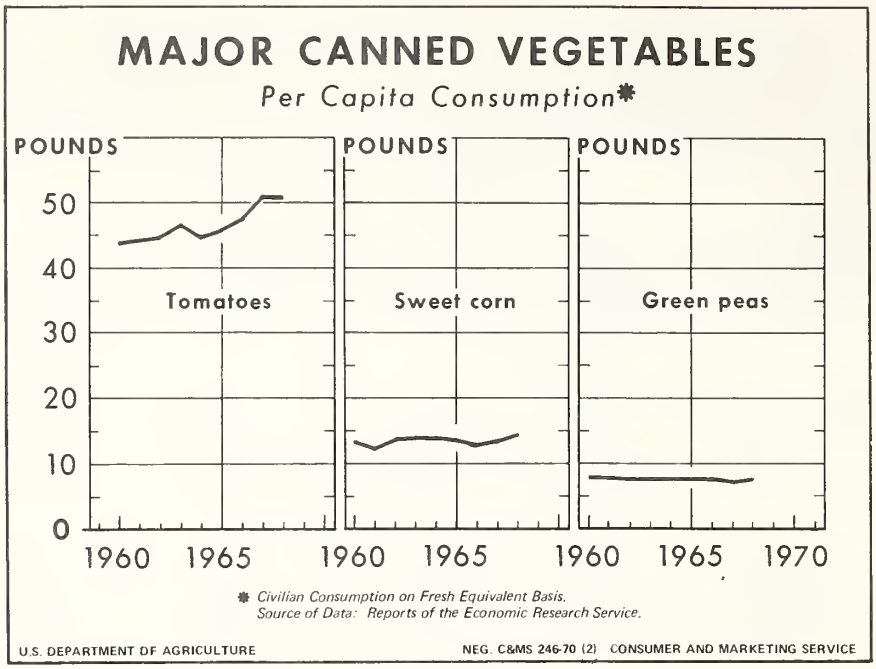


Figure 2

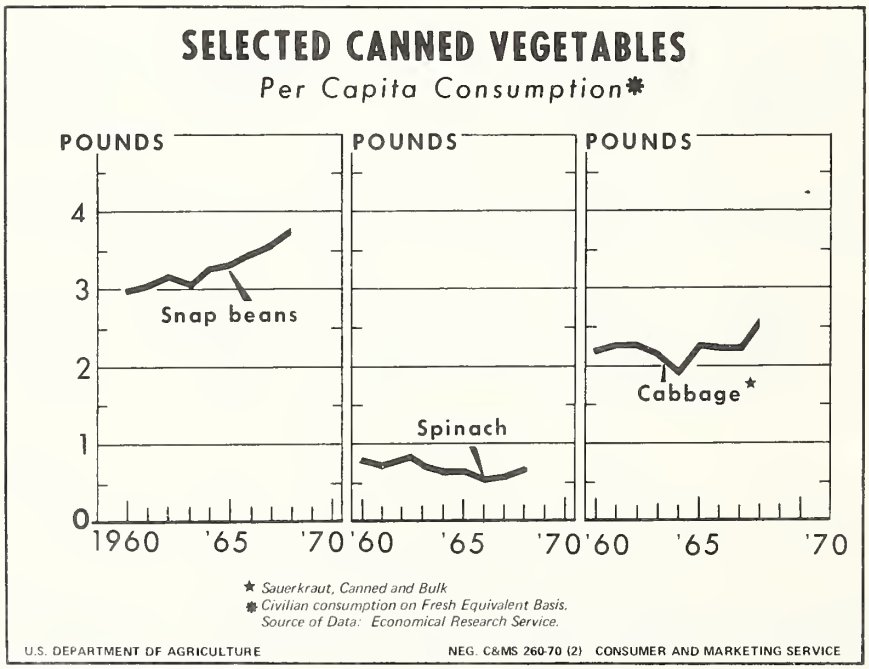
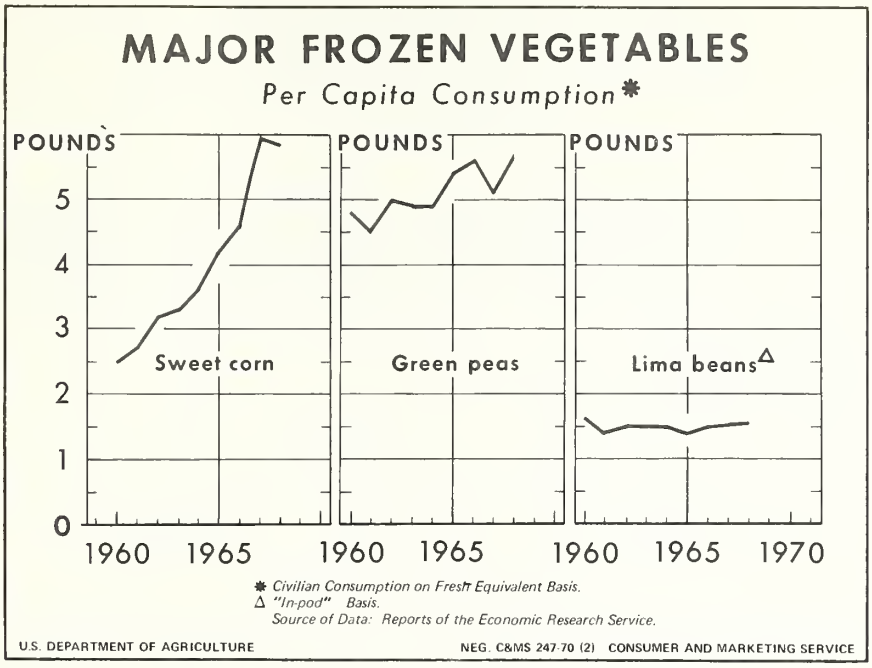


Figure 3



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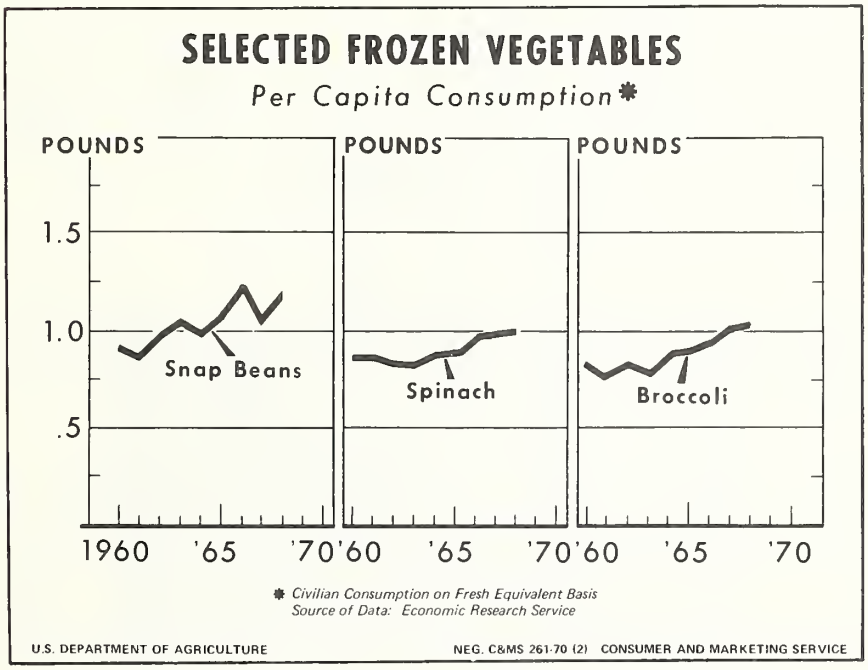


Figure 5

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Lima Beans

Year	Acreage: Planted	Acreage: For harvest	Yield per acre	Production	Price	Value
	(1,000 acres)		(tons)	(1,000 tons)	($ per ton)	($1,000)
1970 Planted Acreage Guide and probable production						
Canning (planted acreage 5 percent less than in 1969)	30.0		1/ .93	26.0		
Freezing (planted acreage equal to 1969)	57.2		1/1.25	67.9		
Total	87.2			93.9		
Background statistics						
Canning						
1969	31.6	29.3	.97	28.3	148.00	4,186
1968	38.2	35.9	.88	31.8	167.00	5,307
Freezing						
1969	57.2	53.6	1.30	69.4	192.00	13,347
1968	72.4	68.8	1.21	83.3	204.00	17,030
Total						
1969	88.7	82.8	1.18	97.7	180.00	17,533
1968	110.6	104.7	1.10	115.1	194.00	22,337

1/ 1966-69 average.

Comments

The 1969 acreage of lima beans for processing was substantially smaller than in 1968. All major producing States contributed to the decrease. In the East and in Washington, 1969 yields averaged much above 1968, but in California yield was low.

Total production in 1969 was considerably less than in 1968. Output for freezing was down 17 percent and canning, 11 percent. About two-thirds of the 1969 total production was utilized by freezers and a third by canners.

As a result of the smaller production and lower prices to growers, the 1969 crop value of $4.2 million was off sharply from the $5.3 million in 1968.

Canned Lima Beans

The 1969 carryover of canned lima beans was a record. However, this was offset by a 1969 pack reduction. The 1969-70 total supply was indicated at 5.4 million cases (basis 24/303's), slightly more than the 1968-69 total.

Into midwinter of 1969-70, cumulative disappearance of canned lima beans was slightly below the comparable period in 1968-69. Assuming a normal rate of disappearance during the remainder of the 1969-70 marketing season, the 1970 carryover of canned lima beans will be near the 1969 record. Canned and frozen data are shown in Figures 6 and 7.

1970 Guide-Canning

The 1970 guide is a planted acreage 5 percent less than in 1969. Such an acreage, with normal abandonment and a 1966-69 average yield, will result in a production 8 percent less than in 1969.

Frozen Lima Beans

Carryover stocks were high in 1969, but the pack was reduced substantially. As a result, total supply for the 1969-70 marketing season was about 210 million pounds compared with 216 million in 1968-69.

Into the midwinter of 1969-70, cumulative disappearance of frozen lima beans was substantially less than in the comparable period in 1968-69, and slightly less than in 1967-68. Thus, the 1970 carryover of frozen lima beans likely will be heavy, and a smaller pack appears necessary. However, assuming an average yield on an equal acreage in 1970, there would be a slight reduction in total production for freezing.

1970 Guide-Freezing

The 1970 guide is a planted acreage equal to 1969. Such an acreage, with normal abandonment and a 1966-69 average yield, will result in a production 2 percent less than in 1969.

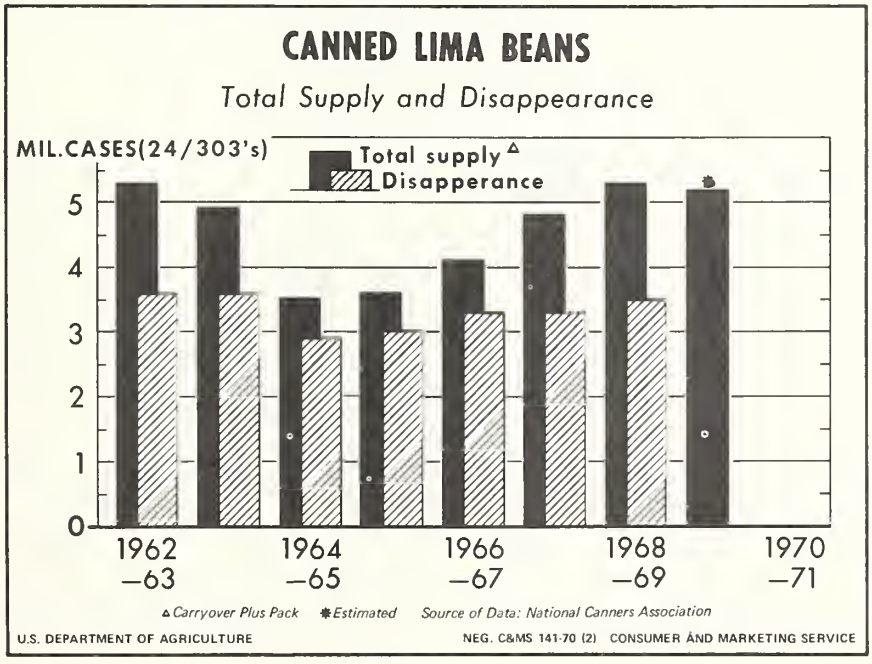


Figure 6

Supply and Disappearance of Processed Lima Beans

	Marketing Season				
	1969-70	1968-69	1967-68	1966-67	1965-66
Canned Lima Beans		Million cases (basis 24/303's)			
Carryover	1.8	1.5	.8	.6	.6
Pack	3.6	3.8	4.0	3.5	3.0
Total Supply	5.4	5.3	4.8	4.1	3.6
Disappearance	N.A.	3.5	3.3	3.3	3.0
Carryover	N.A.	1.8	1.5	.8	.6
Frozen Lima Beans		Million pounds			
Carryover	66.3	50.7	31.6	24.7	24.9
Pack	143.2	165.5	161.3	151.9	145.5
Total Supply	209.5	216.2	192.9	176.6	170.4
Disappearance	N.A.	150.1	142.2	145.0	145.7
Carryover	N.A.	66.3	50.7	31.6	24.7

N.A. - not available.

Sources: National Canners Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers; and Statistical Reporting Service, USDA.

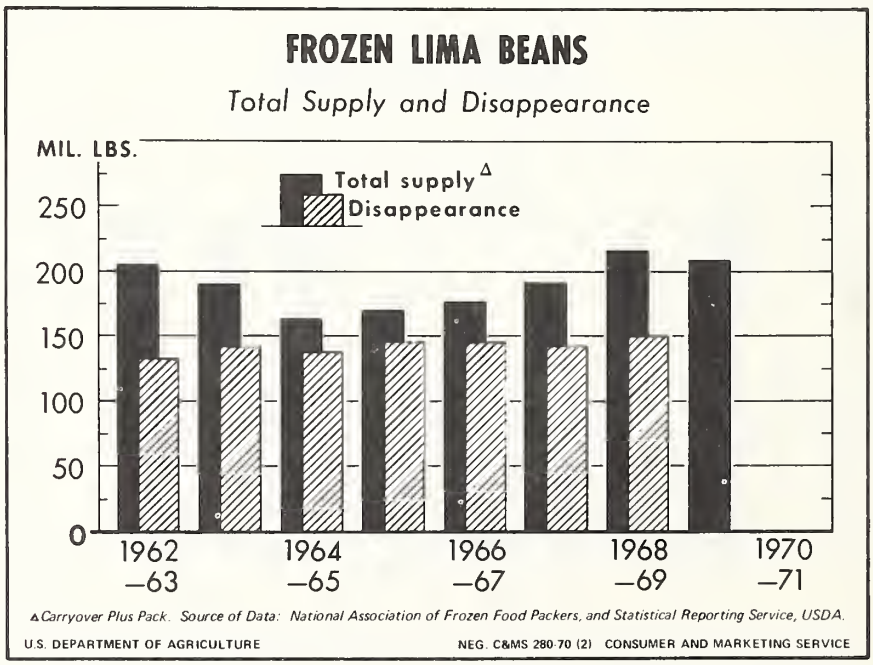


Figure 7

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Snap Beans

Year	Acreage: Planted	Acreage: For harvest	Yield per acre	Production	Price	Value
	(1,000 acres)		(Tons)	(1,000 tons)	($ per ton)	($1,000)
1970 Planted Acreage Guide and probable production						
Canning (planted acreage 5 percent less than in 1969)	191.0		1/ 2.4	444.7		
Freezing (planted acreage equal to 1969)	50.8		1/ 2.4	113.3		
Total	241.8			558.0		
Background statistics						
Canning						
1969	201.0	191.2	2.4	451.6	98.50	44,474
1968	222.7	207.2	2.3	484.6	99.00	47,976
Freezing						
1969	50.8	47.1	2.4	113.9	102.00	11,608
1968	63.2	59.9	2.4	142.0	103.00	14,587
Total						
1969	251.8	238.3	2.4	565.5	99.20	56,082
1968	285.9	267.1	2.3	626.7	99.80	62,563

1/ 1968-69 average yield.

Comments

After reaching an all-time high in 1967, total snap bean plantings were reduced successively in 1968 and 1969. Acreages for both canning and freezing were down sharply in 1969. Substantially smaller 1969 plantings than a year earlier occurred in most major producing States.

In 1969, generally favorable weather for snap bean growth contributed to a relatively high average yield, and the highest since use of mechanical harvesters became widespread.

Despite the high yield, the smaller acreage harvested in 1969 resulted in a total 1969 production a tenth less than the near record-large 1968 tonnage. Production for canning, which accounted for four-fifths of the total, was 7 percent below a year earlier. Production for freezing was a fifth less than in 1968, and a fourth less than the record 1967 output. Most major areas decreased production in 1969.

Snap Beans - Canned

During the 1968-69 season, record-large holdings and relatively low prices contributed to the record disappearance. Total shipments were substantially larger than the previous high in 1967-68. Despite the large movement, the 1969 carryover was a new record.

The 1969 pack was down substantially. All of the decrease was in the pack of green snap beans; the pack of wax beans was increased. The 1969-70 total supply of green and wax beans combined was moderately below the heavy quantity available for 1968-69 marketing.

Canners' shipments to January 1, 1970 were slightly below the comparable period a year-earlier. Green bean stocks in canners' hands on January 1 were down from last year, but wax bean holdings were considerably higher. The 1969-70 total disappearance of green and wax beans combined may match that in 1968-69. Even so, the 1970 carryover will be plentiful. A 1970 acreage moderately smaller than in 1969, with average yield, should furnish an adequate crop for the 1970 pack.

1970 Guide-Canning

The 1970 guide is a planted acreage 5 percent less than in 1969. Such an acreage, with normal abandonment and a 1968-69 average yield, will result in a production 2 percent less than in 1969.

Frozen Snap Beans

Although the disappearance of frozen snap beans was maintained at a high level during the 1968-69 season, the 1969 carryover was heavy, exceeding a year earlier by 15 percent. But this was more than offset by a much smaller pack. Total supplies for the 1969-70 season were moderately below those in 1968-69.

The cumulative disappearance of frozen stocks to January 31, 1970 was moderately above the year-earlier period. Although total disappearance in 1969-70 may be larger than the previous year, the 1970 carryover will be above average. Therefore, an equal acreage in 1970 should provide an adequate production for the 1970 pack.

1970 Guide - Freezing

The 1970 guide is a planted acreage equal to 1969. Such an acreage, with normal abandonment and a 1968-69 average yield, will result in a production about equal to 1969. Data on canned and frozen snap beans are shown in Figures 8 and 9.

Supply and Disappearance of Processed Snap Beans

Commodity	Marketing Season				
	1969-70	1968-69	1967-68	1966-67	1965-66
Canned Snap Beans		Million cases (basis 24/303's)			
Carryover	17.1	15.1	7.8	10.4	7.1
Pack	47.5	51.8	53.2	40.5	45.6
Total Supply	64.6	66.9	61.0	50.9	52.7
Disappearance	N.A.	49.8	45.9	43.1	42.3
Carryover	N.A.	17.1	15.1	7.8	10.4
Frozen Snap Beans		Million pounds			
Carryover	90.2	78.7	48.2	40.6	52.1
Pack	1/ 201.6	221.5	237.8	231.8	189.5
Total Supply	291.8	300.2	286.0	272.4	241.6
Disappearance	N.A.	210.0	207.3	224.2	201.0
Carryover	N.A.	90.2	78.7	48.2	40.6

N.A. - Not available.

1/ Includes an estimate for Italian green beans.

Sources: National Canners Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers; and Statistical Reporting Service, USDA.

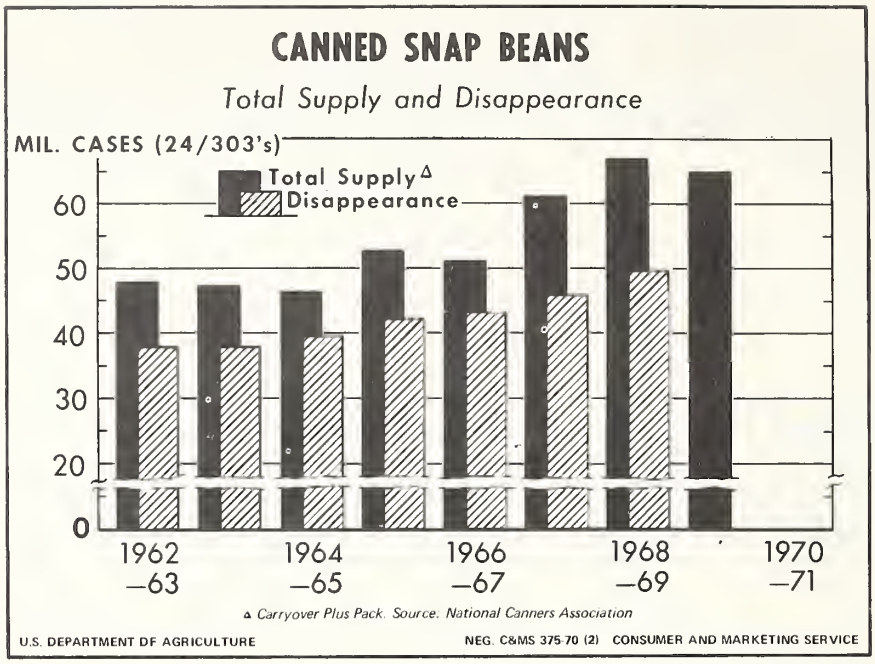


Figure 8

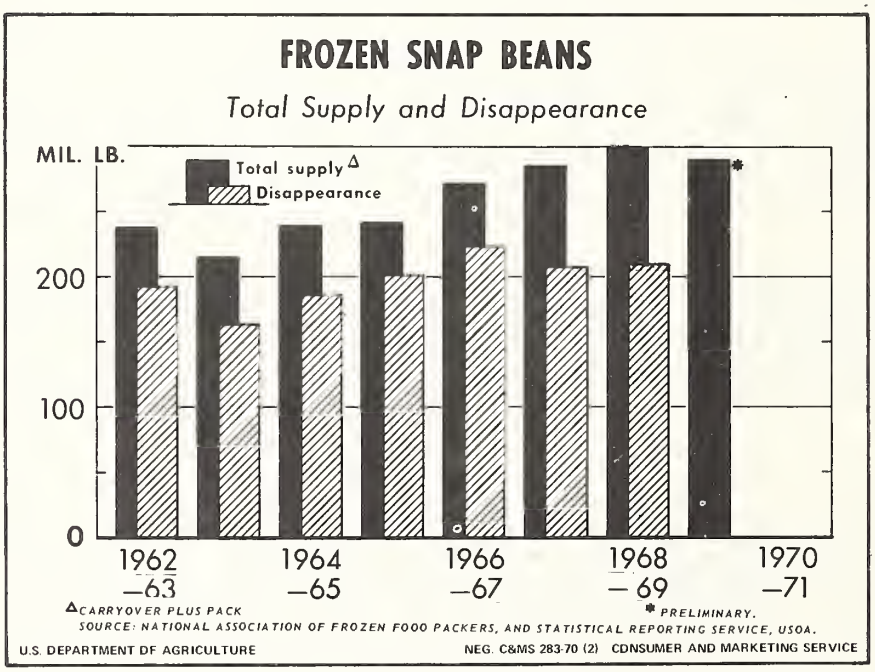


Figure 9

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Beets

Year	Acreage		Yield per acre	Production	Price	Value
	Planted	For harvest				
	(1,000 acres)		(tons)	(1,000 tons)	($ per ton)	($1,000)
1970 Planted Acreage Guide and probable production						
Canning (planted acreage 10 percent less than in 1969)	16.9		1/12.2	194.0		
Background statistics						
Canning						
1969	18.8	17.8	12.1	215.8	21.90	4,728
1968	22.1	21.2	12.7	269.2	23.80	6,394

1/ 1967-69 average.

Comments

The 1969 production of beets for canning was 20 percent smaller than the 1968 record output (Figure 10). Reductions in both total acreage and average yield were responsible for the decrease. Sharp reductions in output in 1969 were reported in New York, Wisconsin and Texas. However, production in Oregon was up slightly.

The 1968 pack of canned beets was a record. Although total disappearance of canned beets during the 1968-69 marketing season also was a new high, the 1969 carryover stocks were heavy, amounting to 5.9 million cases (basis 24/303's) compared with 3.6 million cases in 1968. Although data are not yet available on the 1969 pack, it is expected to be considerably smaller than in 1968. Nevertheless, the 1969-70 total supply was indicated to be about as large as a year earlier.

Reflecting the heavy inventory, trade reports indicated prices for "fancy sliced" canned beets in the early winter of 1969-70 were considerably below year-earlier levels. However, prices for "fancy diced" were holding close to 1968-69 levels.

Although the 1969-70 disappearance of canned beets may be at a near-record level, 1970 carryover likely will be large. Therefore, a reduction in production of beets for processing is recommended in 1970.

1970 Guide

The 1970 guide is a planted acreage 10 percent less than in 1969. Such an acreage, with normal abandonment and a 1967-69 average yield, will result in a production 10 percent less than in 1969.

Supply and Disappearance of Canned Beets

Commodity	Marketing Season				
	1969-70	1968-69	1967-68	1966-67	1965-66
Canned Beets	Million cases (basis 24/303's)				
Carryover	5.9	3.6	3.3	3.2	4.7
Pack	N.A.	14.6	11.8	11.4	10.0
Total Supply 1/	N.A.	18.2	15.1	14.6	14.7
Disappearance	N.A.	12.3	11.5	11.3	11.5
Carryover	N.A.	5.9	3.6	3.3	3.2

N.A. - Not available.

1/ On January 1, 1970, canners stocks totaled 9.5 million cases, basis 24/303's. This compared with 10.3 million a year earlier and 6.5 million on January 1, 1968.

Sources: National Canners Association, and Bureau of the Census, U. S. Department of Commerce.

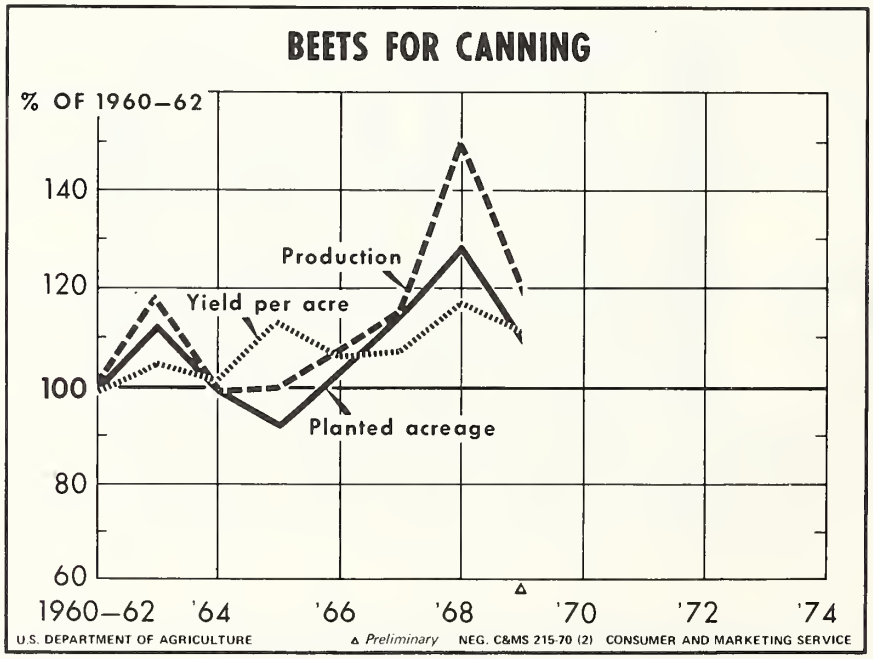


Figure 10

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Cabbage - Early Fall
(Fresh Market and Processing)

Year	Acreage		Yield			
	Planted	For harvest	per acre	Production	Price	Value
	(1,000 acres)		(cwt.)	(1,000 cwt.)	($ per cwt.)	($1,000)
1970 Planted Acreage Guide and probable production (planted acreage equal to 1969)	31.8		1/ 297	9,081		
Background statistics						
1969	31.8	30.7	280	2/ 8,604	2.43	20,551
1968	31.5	30.2	305	2/ 9,203	2.22	20,046

1/ 1967-69 average yield.
2/ Includes some quantities of early fall storage cabbage in Upstate New York, harvested but not sold because of shrinkage and waste (in 1,000 cwt.): 164 in 1969, and 191 in 1968.

Comments

The 1969 acreage of early fall cabbage for fresh market and processing was slightly larger than in 1968. Substantially larger plantings in Michigan, Oregon and Idaho accounted for most of the increase. The acreage in Upstate New York was down slightly while that in Ohio and Wisconsin equalled 1968. The acreage contracted for kraut in 1969 was estimated at 11,350 acres, 3 percent more than in 1968.

Excessive rainfall early in the season and extremely dry weather during September in the Northeast and in the Midwest reduced cabbage yields in 1969. Although early fall crops in several States in the South and Far West developed favorably, yields in Upstate New York, Pennsylvania, and Wisconsin were below year-earlier levels. In total, 1969 early fall cabbage production was 7 percent less than in 1968, and a tenth smaller than in 1967.

The 1969 sauerkraut carryover was moderate. At 3.4 million cases (basis 24/303's), it was 15 percent less than the large quantity on hand at the beginning of the 1968-69 season. Because of the smaller 1969 production compared with 1968, total 1969-70 cuttings are expected to be at least moderately below those in 1968-69. On December 1, 1969, packers' total stocks (Figure 11) were well below comparable holdings in both 1968 and 1969. Sauerkraut prices are above year-earlier levels.

A 1970 pack larger than in 1969 will be required. With an average yield per acre, an equal acreage would provide a sufficient tonnage for the 1970 pack.

1970 Guide

The 1970 guide is a planted acreage equal to 1969. Such an acreage, with normal abandonment and a 1967-69 average yield, will result in a production 6 percent more than in 1969.

Supply and Disappearance of Sauerkraut

Commodity	Marketing Season				
	1969-70	1968-69	1967-68	1966-67	1965-66
Sauerkraut	Million cases (basis 24/303's)				
Carryover	3.4	4.0	2.3	3.1	2.7
Pack	N.A.	11.9	14.5	10.4	12.1
Total Supply	N.A.	15.9	16.8	13.6	15.8
Disappearance	N.A.	12.5	12.8	11.3	12.7
Carryover	N.A.	3.4	4.0	2.3	3.1

N.A. - Not available.
Sources: National Kraut Packers Association, and Bureau of the Census, U. S. Department of Commerce.

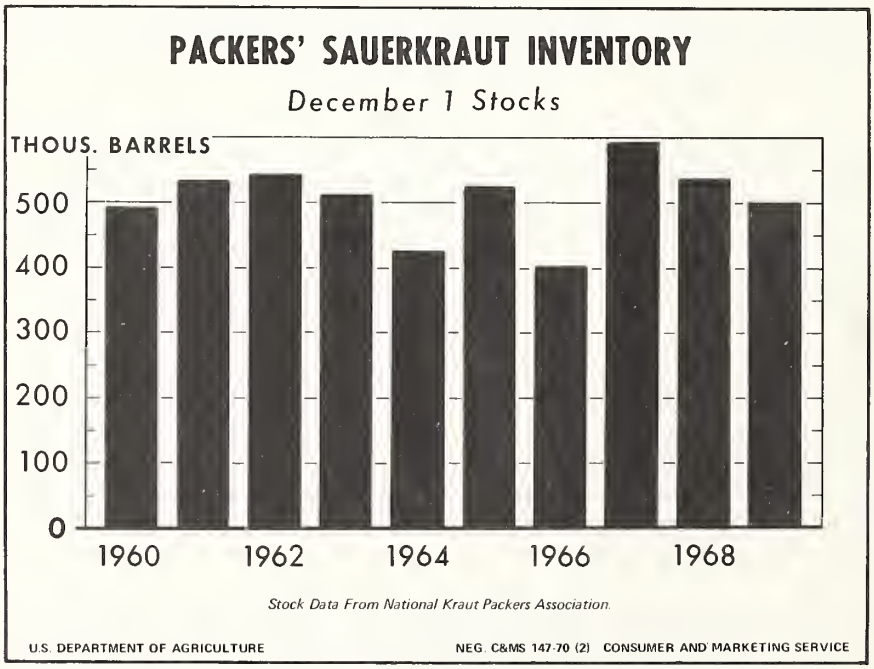


Figure 11

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Sweet Corn

Year	Acreage: Planted	Acreage: For harvest	Yield per acre	Production	Price	Value
	(1,000 acres)		(tons)	(1,000 tons)	($ per ton)	($1,000)
1970 Planted Acreage Guide and probable production						
Canning (acreage 5 percent less than in 1969)	330.4		1/ 4.41	1,384.3		
Freezing (acreage 10 percent less than in 1969)	103.5		1/ 5.34	519.6		
Total	433.9			1,903.9		
Background statistics						
Canning						
1969	347.8	335.0	4.37	1,462.8	23.90	34,954
1968	416.7	393.0	4.56	1,792.6	24.40	43,725
Freezing						
1969	115.0	111.4	5.60	623.7	27.70	17,272
1968	137.0	126.2	5.44	686.7	28.70	19,680
Total						
1969	462.8	446.4	4.67	2,086.5	25.00	52,226
1968	553.7	519.2	4.78	2,479.3	25.60	63,405

1/ 1967-69 average.

Comments

The U.S. total acreage of sweet corn for processing, which was increased successively from 1964 through 1968, was reduced sharply in 1969 (see page 35). Although a near-record yield was obtained, total production was 16 percent less than in 1968.

All major producing areas reduced acreage in 1969, and production was below a year earlier in all major States except Delaware, Maryland, and Idaho, where high yields resulted in larger crops. The 1969-70 total supply of canned corn showed a slightly improved balance compared with normal market requirements. However, total supply of frozen sweet corn is heavy, with cumulative disappearance so far in 1969-70 down sharply from the record movement last season.

Canned Sweet Corn

Despite a record disappearance in 1968-69, the 1969 carryover of canned sweet corn was an all-time high. The 1969 pack was reduced by approximately

10.0 million cases from 1968. The 1969-70 total supply was indicated at 63.8 million cases, (basis 24/303's) compared with 67.3 million at the beginning of 1968-69 (Figure 12).

Into midwinter of 1969-70, cumulative disappearance of canned sweet corn was a tenth below a year earlier. The decline in disappearance is associated with moderately higher prices at canneries compared with low levels last season. Although 1969-70 total disappearance is expected to be high, the 1970 carryover will be large. Therefore, a moderate reduction is recommended in 1970 acreage for canning.

1970 Guide - Canning

The 1970 guide for canning is an acreage 5 percent less than in 1969. Such an acreage, with normal abandonment and a 1967-69 average yield, will result in a production 5 percent less than in 1969.

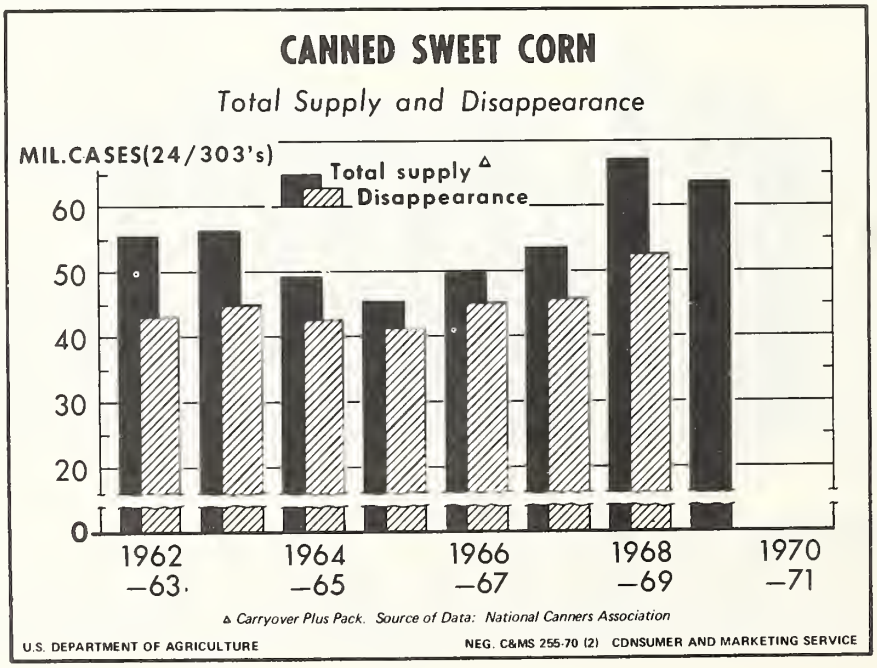
Frozen Sweet Corn

The 1969-70 total supply of frozen sweet corn (cut corn and corn-on-cob) was 458.2 million pounds, down 20 million from the 1968-69 record (Figure 13). Cumulative disappearance of cold storage holdings into midwinter 1969-70 was down sharply compared with last season. Even though the rate of disappearance may accelerate during the last half of the 1969-70 marketing season, 1970 carryover of frozen corn likely will be record-large. Therefore, the 1970 production for freezing should be reduced.

1970 Guide - Freezing

The 1970 guide is a planted acreage 10 percent less than in 1969. Such an acreage, with normal abandonment and a 1967-69 average yield, will result in a production 17 percent less than in 1969.

Figure 12



Supply and Disappearance of Processed Sweet Corn

Commodity	Marketing Season				
	1969-70	1968-69	1967-68	1966-67	1965-66
Canned Sweet Corn		Million cases (basis 24/303's)			
Carryover	14.6	8.0	4.5	4.1	6.3
Pack	49.4	59.3	49.3	45.5	39.1
Total Supply	64.0	67.3	53.8	49.6	45.4
Disappearance	N.A.	52.7	45.8	45.1	41.3
Carryover	N.A.	14.6	8.0	4.5	4.1
Frozen Sweet Corn		Million pounds			
Carryover	110.6	67.7	46.1	30.1	21.4
Pack	347.6	410.9	360.1	344.4	262.5
Total Supply	458.2	478.6	406.2	374.5	283.9
Disappearance	N.A.	368.0	338.5	328.4	253.8
Carryover	N.A.	110.6	67.7	46.1	30.1

N.A. - Not available.

Source: National Canners Association; Bureau of the Census, U. S. Department of Commerce; National Association of Frozen Food Packers; and Statistical Reporting Service, USDA.

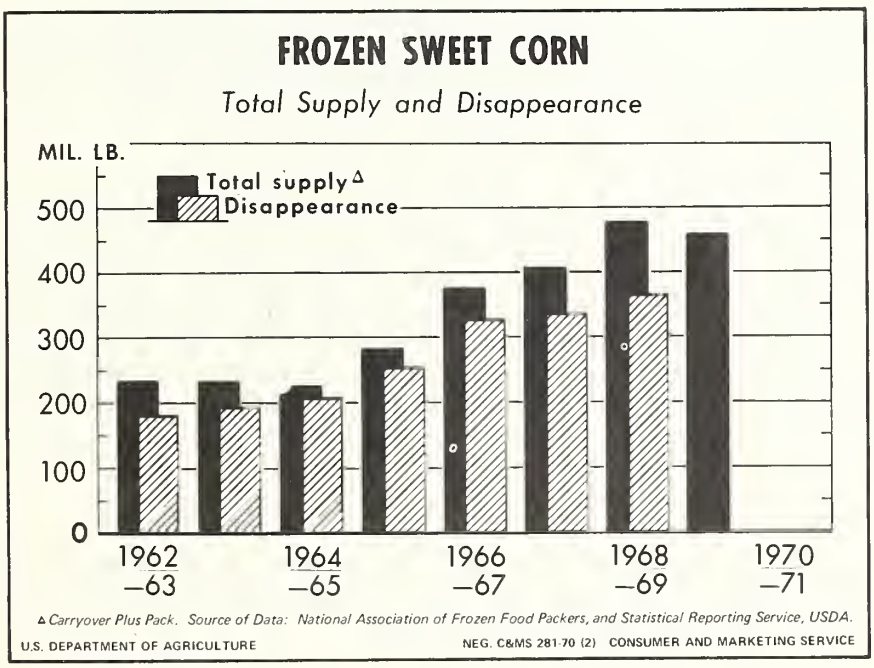


Figure 13

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Cucumbers for Pickles

Year	Acreage: Planted	Acreage: For harvest	Yield per acre	Production	Price	Value
	(1,000 acres)		(tons)	(1,000 tons)	($ per ton)	($1,000)
1970 Planted Acreage Guide and probable production (planted acreage 15 percent more than in 1969)	163.1		1/3.85	577.9		
Background statistics						
Canning						
1969	141.8	131.0	3.88	508.0	91.90	46,668
1968	159.9	144.8	3.83	554.6	92.20	51,143

1/ 1967-69 average.

Comments

The total acreage of cucumbers for processing in 1969 was reduced substantially below 1968, and was 15 percent less than the 1967 record. All major States except Michigan, Delaware, Maryland and Virginia reduced plantings in 1969. In Michigan, the leading State in production, acreage was increased slightly.

The 1969 average yield was high. An extremely high yield in the Northern region more than offset a low outturn in the West. Total production was almost a tenth less than in 1968, with all regions contributing to the decrease. With the smaller production and a slightly lower price per ton, total crop value was $47 million compared with $51 million in 1968.

Although total disappearance of cucumber pickles continued the uptrend of recent seasons, the 1969 carryover was high. Nevertheless, it was down moderately from the 1968 record. Due to a sharp drop in production in 1969, total supply for 1969-70 marketing was estimated at 608,200 tons (Figure 14) compared with 661,800 a year earlier. The 1969-70 total disappearance of cucumber pickles likely will at least match the record in 1968-69. If so, October 1 stocks in 1970 will be below average, and an increase in 1970 production is recommended.

1970 Guide

The 1970 guide is a planted acreage 15 percent more than in 1969. Such an acreage, with normal abandonment and a 1967-69 average yield, will result in a production 14 percent more than in 1969.

Supply and Disappearance of Pickles

Commodity	Marketing Season				
	1969-70	1968-69	1967-68	1966-67	1965-66
	1,000 tons				
October 1 stocks	100.2	107.2	57.7	37.1	71.5
Production	508.0	554.6	595.6	534.0	428.0
Total Supply	608.2	661.8	653.3	571.1	499.5
Disappearance	N.A.	561.6	545.9	517.7	462.4

N.A. - Not available.

Source: Statistical Reporting Service, USDA.

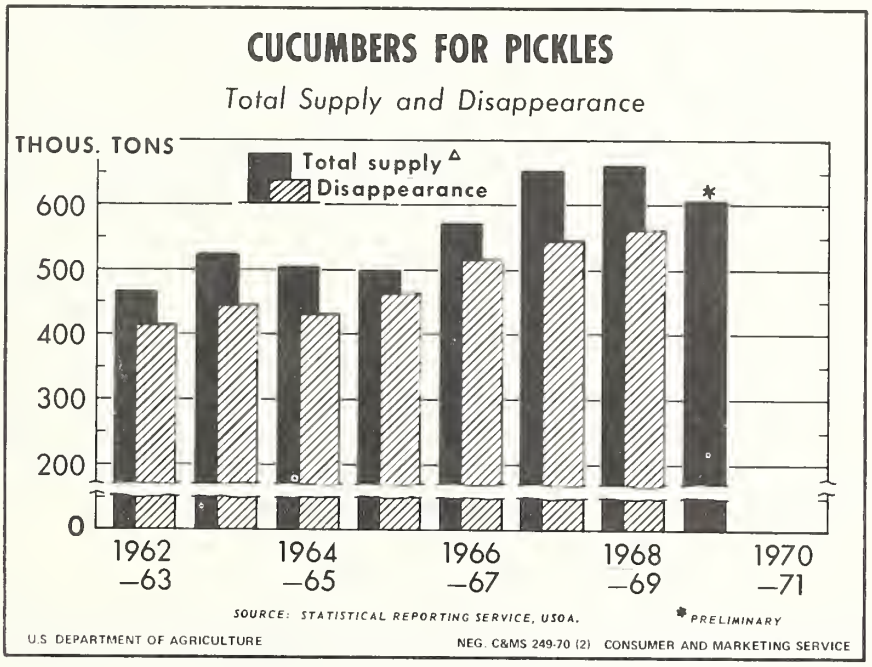


Figure 14

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Green Peas

Year	Acreage: Planted	Acreage: For harvest	Yield per acre	Production	Price	Value
	(1,000 acres)		(tons)	(1,000 tons)	($ per ton)	($1,000)
1970 Planted Acreage Guide and probable production						
Canning (planted acreage equal to 1969)	280.2		1/ 1.230	320.5		
Freezing (planted acreage equal to 1969)	164.8		1/ 1.386	207.8		
Total	445.0			528.3		
Background statistics						
Canning						
1969	280.2	255.2	1.240	316.3	107.00	34,000
1968	314.4	286.4	1.235	353.6	109.00	38,648
Freezing						
1969	164.8	152.4	1.365	208.4	104.00	21,746
1968	185.6	165.7	1.375	228.1	104.00	23,622
Total						
1969	445.0	407.6	1.285	524.7	106.00	55,746
1968	499.9	452.1	1.285	581.7	102.00	62,270

1/ 1967-69 average.

Comments

The total acreage of green peas for processing, which increased from 1965 through 1968, was cut sharply in 1969. All major producing areas reduced acreage. In the eastern and central regions, average yields were less than in 1968. In the West, particularly in Oregon and Washington, yields were higher.

In 1969, production for both canning and freezing was down about a tenth from 1968. The proportions of the total output canned and frozen were close to year-earlier levels, with 60 percent canned and 40 percent frozen. As a result of the reduction in output, supplies of canned and frozen green peas have been in a slightly better improved balance with market needs than last season.

Green Peas - Canned

The 1969 carryover stocks were high. But a moderate pack in 1969 more than offset the high carryover and total supply for 1969-70 was 6 percent less than in 1968-69 (Figure 15).

Canners' list prices for canned green peas in 1969-70 have been holding somewhat higher than last season. Partly as a result of higher prices, the cumulative disappearance of canned green peas in the 1969-70 season is less than the comparable period in 1968-69. However, assuming a normal rate of disappearance during the remainder of the current season, the 1970 carryover stocks are expected to be slightly less than in 1969. A production for canning in 1970 about equal to 1969 should result in an adequate pack for the 1970-71 marketing season.

1970 Guide - Canning

The 1970 guide for canning is a planted acreage equal to 1969. Such an acreage, with normal abandonment and a 1967-69 average yield, will result in a production slightly more than in 1969.

Green Peas - Frozen

A relatively small pack of frozen green peas in 1969 more than offset record carryover stocks, and total supply for the 1969-70 marketing season was 8 percent less than record amount a year earlier (Figure 16). Disappearance of frozen stocks in the current season has been at a relatively low rate, and on January 31, holdings were slightly above the high total last season. The 1970 carryover of frozen green peas is expected to be large. Consequently, 1970 acreage for freezing should be no more than last season.

1970 Guide - Freezing

The 1970 guide for freezing is a planted acreage equal to 1969. Such an acreage, with normal abandonment and a 1967-69 average yield, will result in a production slightly less than in 1969.

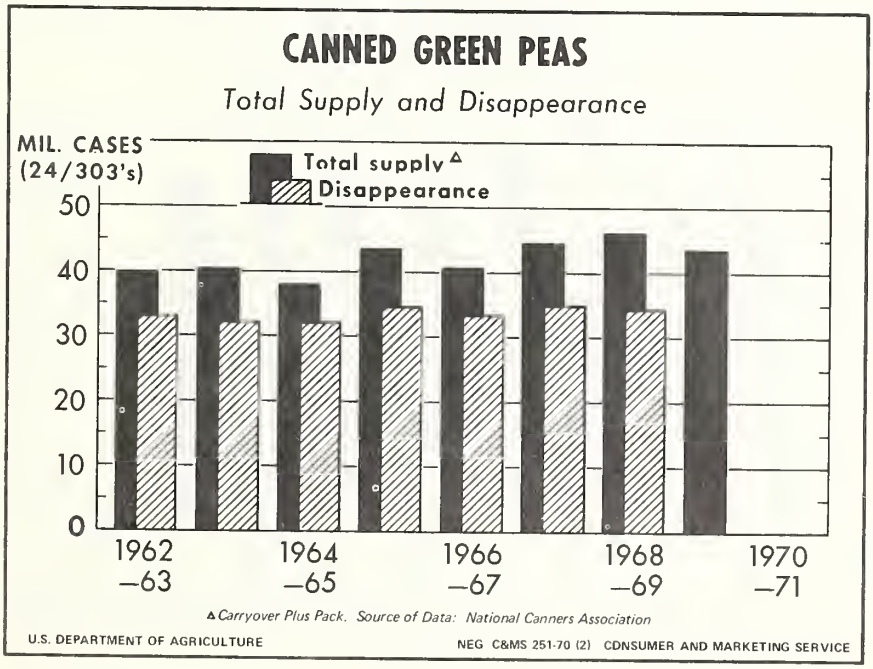


Figure 15

Supply and Disappearance of Processed Green Peas

Commodity	Marketing Season				
	1969-70	1968-69	1967-68	1966-67	1965-66
Canned Green Peas		Million cases (basis 24/303's)			
Carryover	11.4	9.9	7.1	8.8	5.9
Pack	32.1	36.2	37.7	31.9	37.6
Total Supply	43.5	46.1	44.8	40.6	43.5
Disappearance	N.A.	34.7	34.9	33.5	34.7
Carryover	N.A.	11.4	9.9	7.1	8.8
Frozen Green Peas		Million pounds			
Carryover	145.5	124.3	100.5	115.0	97.5
Pack	364.9	429.4	424.2	375.4	443.3
Total Supply	510.4	553.7	524.7	490.3	540.8
Disappearance	N.A.	408.2	400.4	389.8	425.8
Carryover	N.A.	145.5	124.3	100.5	115.0

N.A. - Not available.

Sources: National Canners Association; National Association of Frozen Food Packers; Bureau of the Census, U. S. Department of Commerce; and the Statistical Reporting Service, USDA.

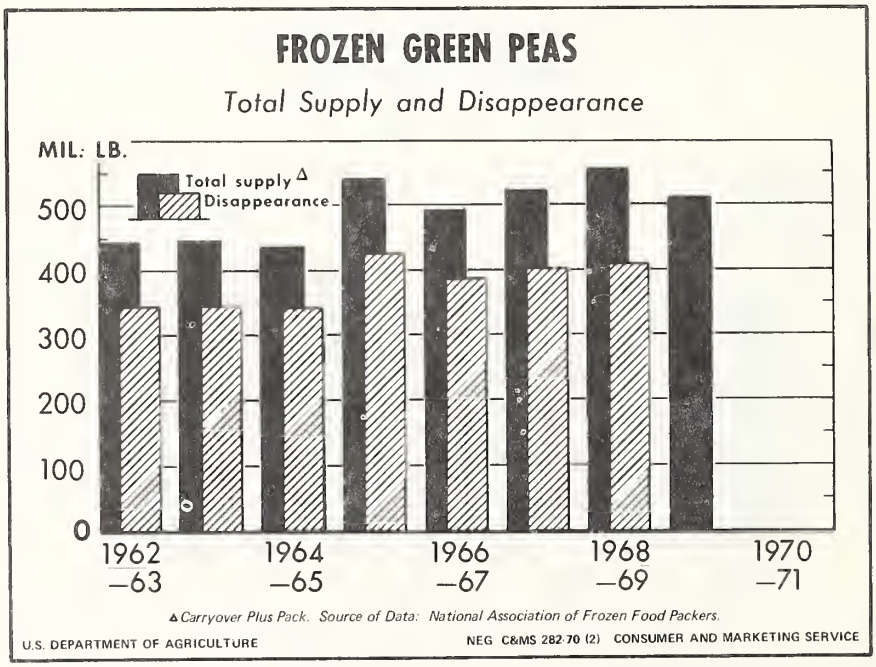


Figure 16

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Spinach

Year	Acreage		Yield per acre	Production	Price	Value
	Planted	For harvest				
	(1,000 acres)		(tons)	(1,000 tons)	($ per ton)	($1,000)
1970 Planted Acreage Guide and probable production						
Freezing (planted acreage 25 percent more than in 1969)	14.0		1/6.4	77.4		
Background statistics						
Freezing						
1969	11.2	9.7	6.1	58.7	43.00	2,526
1968	14.1	12.9	6.7	86.3	40.80	3,520

1/ 1968-69 average.

Comments

The total acreage of spinach for processing in 1969 was the smallest since 1939. Despite a record yield, total production was sharply below 1968, with all of the decrease in output for freezing. Output for canning was up substantially. Rains resulted in a small crop in California. Tonnage there was off 29 percent from 1968. A spinach production chart is on page 35.

In 1969, 56 percent of the tonnage was produced for canning and 44 percent for freezing. These percentages were reversed in 1968. The 1969 frozen pack was well below average, but the canned pack was estimated to be larger than in 1968.

Spinach - Canning (Data on 1970 carryover and pack are not available)

Spinach - Frozen

A smaller pack offset a high carryover, and 1969-70 total supply was the smallest since 1965-66 (Figure 17). On January 31, 1970, cold storage holdings were 27.4 million pounds, about half the year-earlier record of 56.4 million pounds. The 1970 carryover of frozen spinach will be small. Therefore, a substantial increase is recommended in 1970 production for freezing.

1970 Guide - Frozen

The 1970 guide is a planted acreage 25 percent more than in 1969. Such an acreage, with normal abandonment and a 1968-69 average yield, will result in a production 32 percent more than in 1969.

Supply and Disappearance of Processed Spinach

Commodity	Marketing Season				
	1969-70	1968-69	1967-68	1966-67	1965-66
Frozen Spinach		Million pounds			
Carryover	41.8	42.7	34.7	30.4	38.2
Pack	N.A.	154.0	153.2	142.9	122.3
Total Supply	N.A.	196.7	187.9	173.3	160.5
Disappearance	N.A.	154.9	145.2	138.6	130.1
Carryover	N.A.	41.8	42.7	34.7	30.4

N.A. - Not available.

Sources: National Association of Frozen Food Packers; and the Statistical Reporting Service.

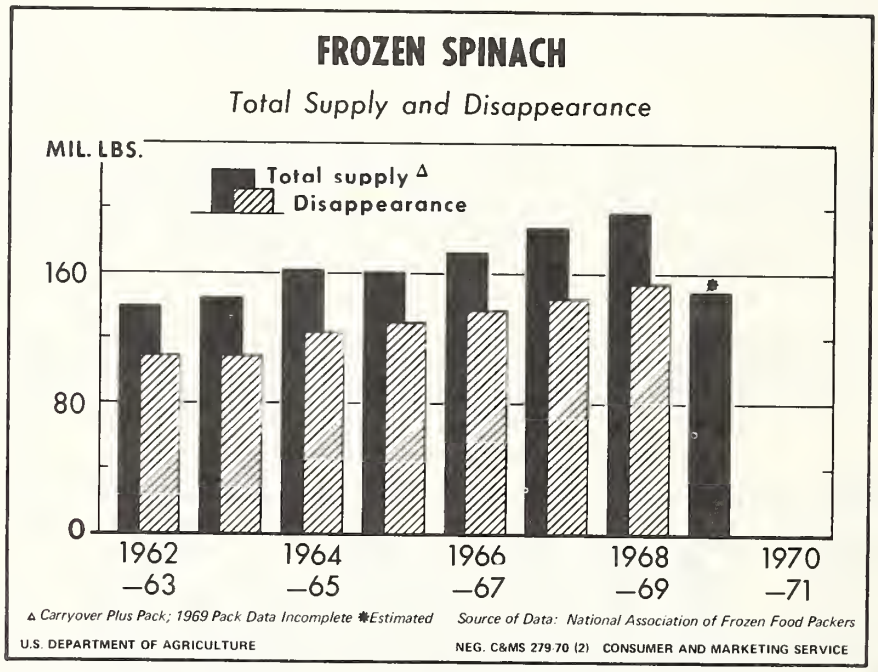


Figure 17

1970 Acreage-Marketing Guides
Vegetables for Commercial Processing

Tomatoes

Year	Acreage: Planted	Acreage: For harvest	Yield per acre	Production	Price	Value
	(1,000 acres)		(tons)	(1,000 tons)	($ per ton)	($1,000)
1970 Planted Acreage Guide and probable production (Planted acreage 5 percent less than in 1969)	262.8		1/ 18.5	4,715.6		
Background statistics						
1969	276.6	271.2	18.2	4,928.8	34.70	171,103
1968	373.8	370.2	18.8	2/6,965.9	3/40.20	280,362

1/ 1968-69 average.
2/ Includes some quantities not delivered because of economic conditions.
3/ Average price derived.

Comments

As a result of record packs of canned tomatoes and tomato products in 1968, 1969 carryover stocks of processed tomato items were indicated to be at record levels. Prices for processed tomatoes generally were depressed throughout the 1968-69 marketing season. A substantial reduction in 1969 packs has resulted in some improvement in prices for 1969-70 marketings. Nevertheless, prices for processed tomato items continue under pressure.

The heavy supplies of canned tomatoes and tomato products in the United States resulted in a decline of 33 percent in combined imports of canned tomatoes, paste and sauce during January-November 1969 compared with the like months in 1968.

Sharp cuts in tomato acreage for processing were reported in principal States in 1969. Total plantings were 26 percent less than in 1968. The average yield was moderately less than the 1968 record. A high yield was obtained in the West, particularly in California, but outturn in several eastern States was below 1968.

The 1969 total production was 4.9 million tons compared with 6.9 million in 1968 (Figure 19). In California, output was down 31 percent; California produced 69 percent of the 1969 total crop, slightly less than in 1968. Total 1969 production in all States other than California was down 25 percent.

Only partial data are available on 1969 packs of processed tomatoes; there are no official reports on canners' stocks. However, the 1969-70 pack of canned tomatoes was estimated at 24.6 million actual cases, a third less than the 1968 record.

The 1969 pack of tomato juice, excluding tomato juice - vegetable juice combinations, was 26.4 million actual cases, 16 percent less than in 1968.

The 1969 tomato catsup pack was much smaller than in 1968. Although the pack in consumer size containers has not been reported, the pack of catsup in 6/10's was down 54 percent. The 1969 pack of chili sauce was reduced a fourth.

In spite of reductions in 1969 packs of canned tomatoes and tomato concentrates, the 1969-70 total supply of processed tomatoes continues excessive compared with usual market requirements, and is estimated to be one of the largest on record. A portion of the 1969-70 inventory includes some stocks from the 1968 and 1967 packs.

Although disappearance of processed tomato supplies is expected to continue at a substantial rate during the remainder of the 1969-70 marketing season, 1970 carryover stocks will be considerably above average. However, carryover stocks of canned tomatoes are expected to be in better balance than tomato concentrates. Therefore, it is recommended that processors utilize a higher portion of the 1970 production for canned tomatoes compared with 1969, and reduce the portion for packs of tomato concentrates.

1970 Guide

The 1970 guide for tomatoes for processing is a planted acreage 5 percent less than in 1969. Such an acreage, with normal abandonment and a 1968-69 average yield, will result in a production 4 percent less than in 1969.

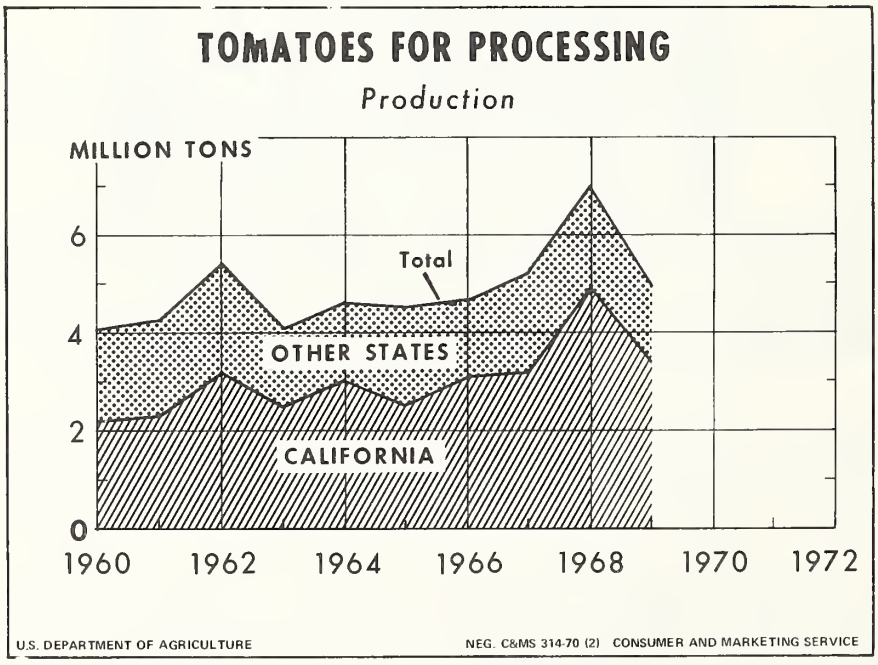


Figure 18

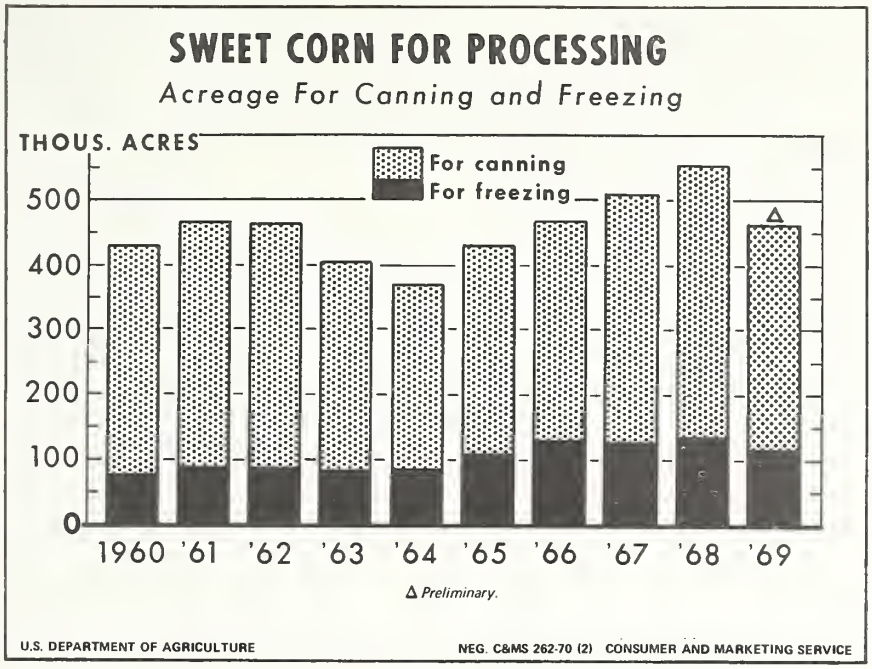


Figure 19

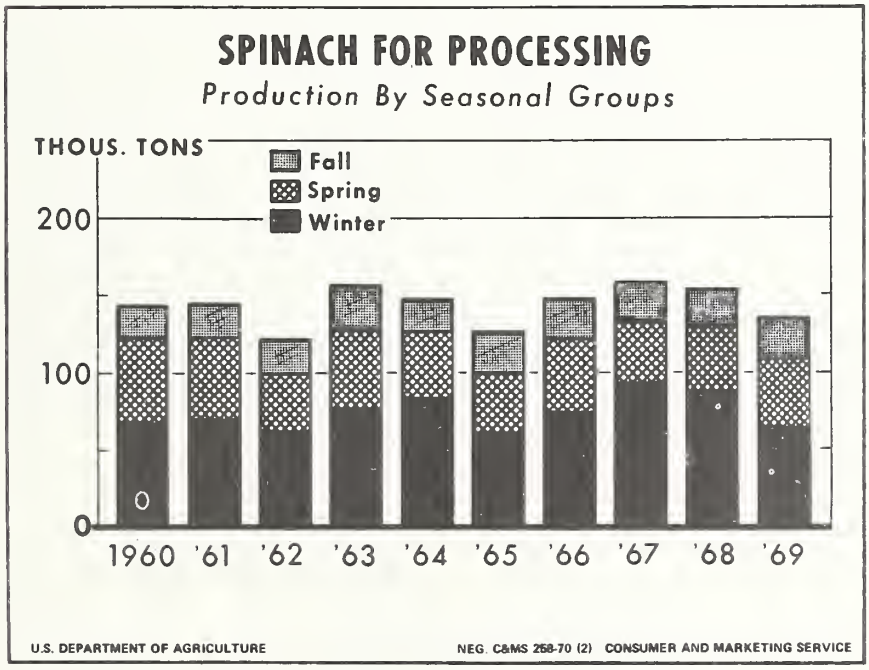


Figure 20

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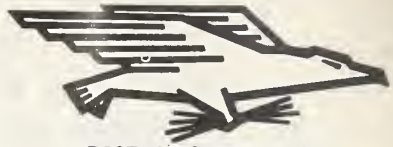

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